

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>		<b>1. CONTRACT ID CODE</b>	<b>PAGE OF PAGES</b> *
<b>2. AMENDMENT/MODIFICATION NO.</b> PR-HQ-00-10038/0001	<b>3. EFFECTIVE DATE</b> 04/24/00	<b>4. REQUISITION/PURCHASE REQ. NO.</b> PR-HQ-00-10038	<b>5. PROJECT NO. (If applicable)</b>
<b>6. ISSUED BY</b> Environmental Protection Agency Bid and Proposal Room, Ariel Rios Building (3802R) 1200 Pennsylvania Avenue, N.W. Washington, DC 20460	<b>CODE</b>	<b>7. ADMINISTERED BY (If other than item 6)</b>	<b>CODE</b>
<b>8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)</b>		<b>(T)</b>	<b>9A. AMENDMENT OF SOLICITATION NO.</b> PR-HQ-00-10038
		<b>T</b>	<b>9B. DATED (SEE ITEM 11)</b> 04/11/00
			<b>10A. MODIFICATION OF CONTRACT/ORDER NO.</b>
			<b>10B. DATED (SEE ITEM 13)</b>
<b>CODE</b>	<b>FACILITY CODE</b>		

**11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS**

☒ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☒ is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning 1 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

**12. ACCOUNTING AND APPROPRIATION DATA (If required)****13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

<b>(T)</b>	<b>A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A</b>
	<b>B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).</b>
	<b>C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:</b>
	<b>D. OTHER (Specify type of modification and authority)</b>

**E. IMPORTANT:** Contractor ☐ is not, ☐ is required to sign this document and return \_\_\_\_\_ copies to the issuing office.

**14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)**

The purpose of this amendment is to add the following section L provision: "Subcontracting Goals for Utilization of Small Businesses, Small Disadvantaged; and to revise the following section L provisions: "Past Performance Information (EP 52.215-105) (SEP 1999)" and "Instructions for the Preparation of Technical Proposals."

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

<b>15A. NAME AND TITLE OF SIGNER (Type or print)</b>		<b>16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)</b> JEANNE M. POOVEY	
<b>15B. CONTRACTOR/OFFEROR</b>	<b>15C. DATE SIGNED</b>	<b>16B. UNITED STATES OF AMERICA</b>	<b>16C. DATE SIGNED</b>
(Signature of person authorized to sign)		(Signature of Contracting Officer)	

NSN 7540-01-152-8070  
PREVIOUS EDITION UNUSABLE

30-105

STANDARD FORM 30 (REV 10-83)  
Prescribed by GSA  
FAR (48 CFR) 52.243

**AMENDMENTS TO THE SOLICITATION**

1. The Section L clause entitled "PAST PERFORMANCE INFORMATION (EP 52.215-105) (SEP 1999)" has been modified. The text is as follows:

(a) Offerors shall submit the information requested below as part of their proposal for both the offeror and any proposed subcontractors for subcontracts expected to exceed \$1,000,000. The information may be submitted prior to other parts of the proposal in order to assist the Government in reducing the evaluation period.

(b) Offerors shall submit a list of all or at least five (5) contracts and subcontracts completed in the last **three (3)** years, and all contracts and subcontracts currently in process, which are similar in nature to this requirement.

(1) The contracts and subcontracts listed may include those entered into with Federal, State and local governments, and commercial businesses, which are of similar scope, magnitude, relevance, and complexity to the requirement which is described in the RFP. Include the following information for each contract and subcontract listed:

- (a) Name of contracting activity.
- (b) Contract number.
- (c) Contract title.
- (d) Contract type.
- (e) Brief description of contract or subcontract and relevance to this requirement.
- (f) Total contract value.
- (g) Period of performance.
- (h) Contracting officer, telephone number, and E-mail address (if available).
- (i) Program manager, telephone number, and E-mail address (if available).
- (j) Administrative Contracting Officer, if different from #8, telephone number, and E-mail (if available).
- (k) List of subcontractors (if applicable).
- (l) Compliance with subcontracting plan goals for small disadvantaged business concerns, monetary targets for small disadvantaged business participation, and the notifications submitted under FAR 19.1202-4(b).

(2) Offerors may provide information on problems encountered and corrective actions taken on the identified contracts and subcontracts.

(c) Offerors should not provide general information on their performance on the identified contracts and subcontracts. General performance information will be obtained from the references.

(1) If no response is received from a reference, the Government will make an attempt to contact another reference identified by the offeror, to contact a reference not identified by the offeror, or to complete the evaluation with those references who responded. The Government shall consider the information provided by the references, and may also consider information obtained from other sources, when evaluating an offeror's past performance.

(2) Attempts to obtain responses from references will generally not go beyond two telephonic messages and/or written requests from the Government, unless otherwise stated in the solicitation.

(d) If negative feedback is received from an offeror's reference, the Government will compare the negative response to the responses from the offeror's other references to note differences. A score will be assigned appropriately to the offeror based on the information.

(e) Offerors must send Client Authorization Letters (see Section J of the solicitation) to each reference listed in their proposal to assist in the timely processing of the past performance evaluation. Offerors are encouraged to consolidate requests whenever possible (i.e., If the same reference has several contracts, send that reference a single notice citing all applicable contracts.) Offerors may send Client Authorization Letters electronically to references with copies forwarded to the contracting officer.

(1) If an offeror has no relevant past performance history, an offeror must affirmatively state that it possesses no relevant past performance history.

(2) Client Authorization Letters should be mailed or E-mailed to individual references no later than five (5) working days after proposal submission. The offeror should forward a copy of the Client Authorization Letter to the contracting officer simultaneously with mailing to references.

(f) Each offeror may describe any quality awards or certifications that indicate the offeror possesses a high-quality process for developing and producing the product or service required. Such awards or certifications include, for example, the Malcolm Baldrige Quality Award, other Government quality awards, and private sector awards or certifications.

(1) Identify the segment of the company (one division or the entire company) which received the award or certification.

(2) Describe when the award or certification was bestowed. If the award or certification is over three years old, present evidence that the qualifications still apply.

(g) Past performance information will be used for both responsibility determinations and as an evaluation factor for award. The Past Performance Questionnaire identified in Section J will be used to collect information on

an offeror's performance under existing and prior contracts/subcontracts for products or services similar in scope, magnitude, relevance, and complexity to this requirement in order to evaluate offerors consistent with the past performance evaluation factor set for in Section M. References other than those identified by the offeror may be contacted by the Government and used in the evaluation of the offeror's past performance.

(h) Any information collected concerning an offeror's past performance will be maintained in the official contract file.

(I) In accordance with FAR 15.305 (a) (2) (iv), offerors with no relevant past performance history, or for whom information on past performance is not available, will be evaluated neither favorably nor unfavorably on past performance.

2. The Section L clause entitled "SUBCONTRACTING GOALS FOR UTILIZATION OF SMALL BUSINESSES, SMALL DISADVANTAGED BUSINESSES, WOMEN-OWNED BUSINESSES, AND HUBZONES" has been added. The text is as follows:

The EPA recommends the following subcontracting goals for this procurement:

Small Businesses	50%
Small Disadvantaged Businesses	20%
Women-Owned Small Businesses	6%
HUBZones	1%

3. The Section L clause entitled "INSTRUCTIONS FOR THE PREPARATION OF TECHNICAL PROPOSALS" has been modified. The text is as follows:

You are advised to closely read the technical proposal instructions and evaluation criteria before preparing a technical proposal. The technical proposal will consist of two parts: (1) a written technical proposal, and (2) an oral presentation to the Government. The following sections provide further details regarding the written and oral portions of the technical proposal. Please note that the terms "offerors", "you", "your", etc., as used below, refer to the prime contractor, all subcontractors, consultants, and any other team contractors. Please note that the terms "hotline" and "call center" are used interchangeably.

#### **I. WRITTEN PROPOSAL**

##### **A. General Instructions**

Technical proposals shall be prepared using the following guidance:

1. **Length** - The maximum length of the technical proposals shall be limited to 30 typewritten pages, double-sided, on 8 ½ x 11" paper, using no

less than 11 point character size and no less than an average of 1.0" all around for margins. The following items are excluded from the recommended page limitation: letters of transmittal, cover page, table-of-contents, dividers, and the quality assurance program document. Foldout pages are considered as the total number of 8-1/2 by 11 inch pages or fractions thereof that they fit. Offerors are strongly urged to be as succinct, clear and concise as possible in writing the proposal and adhering to the recommended page limitation.

2. **Organization** - Offerors are advised to supply all information in the sequence and format specified below. The offeror's proposal and supporting documentation must provide sufficient basis for a thorough evaluation. It is suggested that proposals be placed in 3-ring binders with dividers clearly indicating the following sections:

VOLUME I - TECHNICAL PROPOSAL

SECTION 1	UNDERSTANDING OF THE SOW
SECTION 2	PROGRAM MANAGEMENT APPROACH
	<b>2.1 Organizational Management</b>
	<b>2.2 Financial Controls</b>
	<b>2.3 Personnel Recruitment &amp; Retention</b>
	<b>2.4 Personnel Training Plan</b>
	<b>2.5 Quality Assurance Plan</b>
	<b>2.6 Start-up Plan</b>
SECTION 3	PAST PERFORMANCE
SECTION 4	CORPORATE EXPERIENCE
	4.1 Corporate Management Experience
	4.2 Corporate Technical Experience
SECTION 5	FACILITIES AND EQUIPMENT
	5.1 Facilities
	5.2 Equipment
SECTION 6	KEY PERSONNEL QUALIFICATIONS
SECTION 7	SAMPLE INFORMATION REQUESTS

3. **Charts** - Offerors are encouraged to use, whenever appropriate, quantitative and graphical methods to portray facts whenever possible through the use of charts, lists, matrices, diagrams, tabulations, etc.

4. **Prohibition of Cost Data** - All costs or pricing details must be omitted from the technical proposal.

5. Exceptions - Any exceptions or conditional assumptions taken with respect to the requirements of this RFP shall be fully explained. Please note, however, that exceptions or deviations may render your proposal ineligible for an award without discussions.

6. Sufficiency - The information provided in the technical proposal should be concise, factual complete and responsive. Offerors must clearly demonstrate their ability to meet all the requirements contained in this RFP. Stating that you understand and will comply with the Statement of Work, or parts thereof, is considered to be inadequate. Stock phrases, such as "standard procedures will be employed" and "well known techniques will be used", are insufficient. The technical proposal must be sufficient to explain how you propose to comply with the Statement of Work [RFP Attachment 1], including a full explanation of the techniques and procedures you propose to follow.

**B. Required Sections of the Written Proposal****1. Understanding of the Work**

Offerors shall provide a clear, concise and complete explanation of how they proposes to accomplish the required services and functions specified in the Statement of Work. The explanation shall include; (1) an identification of the sources and availability of information needed to conduct the work; and (2) an identification of potential difficulties in conducting the work and practical suggestions for overcoming these difficulties.

**2. Program Management Approach**

Offerors shall describe the their approach to planning, organizing, staffing, administering, managing and coordinating and monitoring contract activities as defined in the Statement of Work. The management approach shall include the following:

a. Organizational Management Tools - Offerors shall submit an organizational chart or matrix which clearly delineates the responsibilities, lines of authority, proposed staffing levels and communication.

b. Financial Controls. Offerors shall describe the financial controls that it will establish to ensure that products and services are delivered within budget.

c. Personnel Recruitment and Retention Plan - Offerors shall provide a personnel recruitment and retention plan which outlines and describes in detail the offeror's approach towards attracting and retaining qualified staff at the staffing levels required to effectively perform under this contract.

d. Personnel Training Plan - Offerors shall submit a plan which describes its procedures for ensuring that contractor staff have the requisite skills to perform the contract activities.

e. Performance Monitoring - Offerors shall submit a Quality Assurance Plan which describes the methods, polices and procedures it will implement to monitor its performance for efficiency, accuracy, completeness of Call Center responses and to ensure questions which require interpretation are properly referred to EPA.

f. Quality Control - The offerors Quality Assurance Plan shall also describe the methods, polices and procedures it will implement to ensure quality control. Offerors shall identify the quality assurance steps that are planned to monitor customer (both EPA and the general public) satisfaction.

g. Start-up Plan - Offerors shall submit a preliminary start-up plan that describes the methods, policies, and procedures it will implement to ensure a timely and effective phase-in within the first (30) calender days of

contract award. The offeror that is awarded the contract must provide a final start-up plan for review and approval by the EPA Project Officer fifteen (15) calendar days after award.



3. Past Performance - Offerors shall submit past performance information in accordance with RFP Section L.8 clause "PAST PERFORMANCE INFORMATION".

4. Corporate Experience - This evaluation criteria is distinct from the Past Performance criteria in that it pertains to *the type and amount* of work previously performed by the offeror rather than the quality of the work performed.

a. Corporate Management Experience - Offerors shall submit a narrative to include references that demonstrates its ability to manage hotlines and clearinghouse information service operations on contracts similar in size and scope to those specified in the Statement of Work. The offeror shall describe its experience in responding to regulatory questions which require investigative research to locate the answers and its experience in responding to routine questions.

[If the offerors corporate management is separate from the proposed management of this hotline project, the offeror shall explain and be evaluated on how its corporate management will provide support for all areas of the operation of this contract].

b. Corporate Technical Experience - Offerors shall submit a narrative to include references that demonstrates its experience in fulfilling technical requirements on contracts similar in size, and scope to those specified in the Statement of Work. Offerors shall describe their experience or familiarity with the environmental regulatory programs, Federal Register notices, guidance and outreach documents. Offerors shall describe its experience using the technologies described in the SOW.

5. Facilities and Equipment - Offerors shall provide a list of all equipment and facilities it proposes to use under this contract. The Government will evaluate the degree to which the proposed equipment, technology and facilities are adequate and appropriate to meet all the performance requirements of the SOW.

a. Facilities - Offerors shall provide its own facilities in which to operate the Call Center and related services as discussed in SOW Part VII, Paragraph A - Facilities.

b. Equipment - Offerors shall provide an equipment list which includes equipment described in SOW Part VII, paragraph B - Equipment. The functions of the equipment shall be stated. Offerors may use Government Furnished Property (listed in SOW Appendix H) as a part of its equipment list.

6. Personnel Qualifications - Offerors shall submit resumes for all key personnel proposed to work on this contract. Personnel shall meet the general labor qualifications detailed in the RFP, section H.18 clause, "LABOR CATEGORY DEFINITIONS," and the specific requirements detailed below. Key personnel for

the contract are those contract staff managers who will be assigned to the project and responsible for performing the hands-on, day-to-day management, and technical oversight and direction of the Call Center operation, as well as training personnel. Offerors are encouraged to summarize experience, expertise and availability in tables and other exhibits.

Resume Instructions: Each resume should clearly identify the following information: proposed job title; academic qualifications and dates thereof; complete experience record showing employer, title and specific duties performed, responsibilities, and assignments by years, beginning with the present and working backwards; and, the specialized experience the individual had in performing each task(s) for which he/she is being proposed.

a. Project Manager(s) - Resumes for individuals proposed as project managers shall also address the following;

i. experience in managing contracts of a similar size and scope to that specified in this solicitation including your ability to manage an information service operation;

ii. academic and other technical qualifications relative to this solicitation including familiarity with statutes and regulations identified in this solicitation;

iii. ability to ensure proper operation of all equipment/technology (e.g., telephone system, Internet, computer modems, e-mail, computers and software needed for research, document production, etc.) identified in this solicitation; and

iv. the percentage of time that will be devoted to the contract.

b. Senior Technical Personnel - Resumes for individuals proposed as Senior Technical Personnel shall also address the following:

i. in-depth technical knowledge of the environmental statutes, regulations, guidance materials, policies, procedures, and programs set forth in the statement of work.

[This may be done by describing the individuals involvement in compliance assistance activities or regulatory development activities or other activities which demonstrate your familiarity of all aspects of the law, statute, act, regulation, policy, procedure, or program areas].

ii. academic and other technical qualifications which demonstrates the individuals ability to fulfill the SOW requirements for which he/she is being proposed.

iii. written and oral communication and customer service skills;

- iv. ability to perform research and familiarity with research resources;
- v. ability to develop and provide training in the technical areas covered by the SOW;
- vi. ability to operate the equipment and technology identified in the SOW; and the ability to teach staff how to use it; and
- vii. the percentage of time that will be devoted to the contract.

[NOTE: These requirements also apply to the proposed management personnel if the proposed management personnel will also perform technical functions.]

7. Sample Information Requests - The offeror shall provide a written explanation of how they would respond to the following requests. This explanation shall include: the identification of potential problems and/or opportunities associated with the request; the manager(s) and staff assigned to handle the request and reasons for their assignment to the request; and the different steps and timing involved in performing the request.

a. SAMPLE INFORMATION REQUEST #1 Temporary Surge in Call Volume:

Explain how you would handle an unexpected temporary surge in the volume of phone calls coming into the Call Center.

b. SAMPLE INFORMATION REQUEST #2 Mock Customer Service Survey:

Prepare a 10 question customer service survey, including a methodology for choosing potential respondents.

c. SAMPLE INFORMATION REQUEST #3 Welcome Message:

Develop a welcome message for the Call Center that accurately and efficiently directs callers to the appropriate program line.

## II. ORAL PRESENTATIONS TO THE GOVERNMENT

### A. General

Offerors shall present their technical approach and recommendations to the issues identified in three (3) Sample Information Requests [identified above] and respond to six (6) Pop-Quiz Questions. The purpose of the oral presentation will be to test the proposed key personnel's knowledge of the solicitation requirements. Only the key personnel, therefore, will be allowed to participate.

**B. Schedule for Presentations**

Presentations will be scheduled with offerors as soon as possible after the closing date for receipt of proposals. The order in which offerors will make their presentations to the EPA Technical Evaluation Panel (TEP) will be determined by a drawing of lots by the Contracting Officer after receipt of written proposals. The presentations will be scheduled as tightly together as possible. Once notified of their scheduled presentation date and time, offerors shall complete their presentations on the scheduled date and time. Requests to reschedule the offeror's oral presentation must be coordinated with and approved by the Contracting Officer and will not be permitted absent compelling circumstances. In the event that a scheduling conflict arises after the order of presentations are set, the CO will have the unilateral right to revise the order of presentations.

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**ORAL PRESENTATION SCHEDULE**


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9:00 am - 10:00 am	Oral Presentation #1A: Offeror's Response to Sample Information Requests
10:00 am - 10:15 am	Break
10:15 am - 11:15 am	Prepare Responses to Quiz Questions (1-6)
11:15 am - 12:15 pm	Oral Presentation #1B: Offeror's Prepared Response To Quiz Questions
12:15 pm - 1:00 pm	Lunch Break
1:00 pm - 2:00 pm	Government's time to question/clarify offerors' responses, if necessary

**C. Place for Presentations**

Presentations shall be performed in person at EPA Headquarters in Washington, DC.

**D. Form of the Presentation**

Presentations will be videotaped and audio taped by the Government. Offerors will be provided a copy of the videotaped presentations if requested. Submission of videotapes or other forms of media containing the presentation is not authorized and such technical proposals shall be rejected.

**E. Presentation Format**

1. Presentations shall be made by the proposed Project Director Manager and up to six other members of the proposed Key Personnel. The detailed oral presentation format is as follows:

2. Offerors shall demonstrate their technical knowledge and understanding using process flow diagrams, as appropriate, presenting their approach to each of the three, Sample Information Requests [as described in the written proposal section above]. Each presentation shall address:

- , identification of potential problems and/or opportunities associated with the request;
  - , the manager(s) and staff assigned to handle the request and reasons for their assignment to the request;
  - , and the different steps and timing involved in performing the request.
3. Offerors will be given 60 minutes to make their presentations on the

Sample Information Requests. If briefing charts are used, they shall consist of, black on clear transparencies (w/o borders or background design, logos, or figures) for use on an overhead projector. EPA will provide the overhead projector. The briefing charts should highlight information in the briefing, not provide a narrative of the briefing content. The offeror shall provide a copy of the briefing charts with the technical proposal. The briefing charts submitted with the proposal must be photocopies of the view charts used during the videotaping. Any substitution of charts will result in a score of inadequate for the presentation. Offerors are responsible for providing a person to flip the view charts, if it will not be done by the briefer. Presenters may use name plates to identify themselves if desired. EPA will provide a flip chart, paper tablet, and black pen marker which offerors will be allowed to use in making their presentations.

4. Following the 1 hour presentation, the presenters will be allowed a 15 minute break.

5. Following the break, offerors will be given six questions that pertain to the Call Center's program areas. Offerors will have sixty minutes to prepare their responses to the questions and sixty minutes to present their responses to the Government. Responses to the questions must be oral, but the team will have access to the Government supplied flip chart during preparation and may use the flip chart (again, black on white background) during the presentation as a visual aid. Offerors are welcome to bring written reference materials to assist in preparing responses. Following this, offerors will be allowed a 45-minute lunch break. During this time, the Government will review the offerors' responses.

6. Following the lunch break, the Government will have up to one hour to question/clarify the offerors' responses to the Information Request presentations and the responses to the questions.

7. For each of the two presentations (responses to the Sample Information Requests and the Pop-Quiz Questions, the Government may request clarification of any points addressed which are unclear and may ask for elaboration by the offeror on any point which was not adequately supported in the presentation. Any such interchange between the offeror and the Government will be for clarification only, and will not constitute communications or negotiations within the meaning of FAR 15.306. The Government intends to award without discussions. If the Government determines that discussions/negotiations and Last And Final Revisions (LAFRs) are necessary, the offeror will not be permitted any revisions to the oral presentation or to the answers given by the offeror's team during the question and answer sessions.

8. NO COST OR PRICING information shall be included in the presentation.

4. The Section M clause entitled "EVALUATION FACTORS FOR AWARD (EPAAR 1552.215-71) (AUG 1999)" has been modified. The text is as follows:

(a) The Government will make award to the responsible offeror(s) whose offer conforms to the solicitation and is most advantageous to the Government cost or other factors considered. For this solicitation, all evaluation factors other than cost or price when combined are significantly more important than cost or price.

(b) Evaluation factors and significant subfactors to determine quality of product or service:

**WRITTEN PROPOSALS****[65 POINTS]**

Each written proposal will be evaluated in six areas:

- Understanding of the Work (15 points)
- Project Management Approach (10 points)
- Past Performance (10 points)
- Corporate Experience (10 points)
- Facilities and Equipment (5 points)
- Personnel Qualifications (15 points)

1. Understanding of the Work (15 Points)

Offerors will be evaluated on their ability to develop approaches which are appropriate, complete, practical and cost-effective for achieving the objectives of the tasks outlined in the Statement of Work (SOW). This section of the offeror's proposal shall include a description of how the SOW activities will be performed, an identification of the sources and availability of information needed to conduct the work, and an identification of potential difficulties in conducting the work and practical suggestions for overcoming these difficulties.

2. Project Management Approach (10 Points)

Offeror will be evaluated on its organizational structure and methods they shall establish to manage the work under this contract. The project management approach will be reviewed for the following:

- a. The appropriateness of the overall organization structure which clearly delineates the responsibilities, lines of authority, and proposed staffing levels;
- b. A description of the financial controls that will be established to ensure that products and services are delivered within budget;
- c. The proposed plan to retain and recruit qualified staff throughout the life of the contract;
- d. The training plan which ensures that the contractor staff have the requisite skills to perform the contract activities;
- e. The ability to monitor performance to ensure efficiency, accuracy, completeness and appropriateness of Call Center responses and to ensure questions that require interpretation are properly referred to EPA;
- f. The quality control and quality assurance steps that are planned to monitor customer (both EPA and the general public) satisfaction; and



g. The adequacy of the proposed start-up plan that will ensure that the Call Center is fully operational and fully staffed with qualified personnel within 30 days of contract award.

3. Past Performance

(10 Points)

To assist the Government in securing the best contractor for the best value, the technical evaluation panel will examine each offeror's past performance, within the last three years, on **contracts and subcontracts** similar to the work identified in the SOW. Note: If a contractor plans to submit an offer, they are invited to submit their past performance information prior to submitting their proposal. However, this information should also be submitted with the official proposal. Offerors will be evaluated on the following factors:

a. Quality of products and services produced which are similar to those described in the SOW;

--The quality of the products and services can be demonstrated by providing information on how well the offeror has met standards of good workmanship and by giving examples of quality-improving innovations to contracted work.

b. Timeliness of performance of tasks, projects, work assignments and other services which are similar to those described in the SOW;

-Timeliness can be demonstrated by providing evidence of adherence to contract scheduled and responsiveness to technical direction and by giving examples of time-saving innovations to contracted work.

c. Cost controls related to past services and products which are similar to those described in the SOW;

-Cost control can be demonstrated by providing evidence of accurate cost forecasting and work being performed at or below the estimated budget with an example(s) of how these cost savings were made.

d. Business practices (customer relations) with past and present contracting organizations on projects similar to those described in the SOW; and

e. Past customers' (e.g., callers to a Hotline or similar operation) satisfaction with the offeror's work that is similar to the work described in the SOW.

Information provided by the offeror and their references on business

practices and customer satisfaction will be examined in order to measure the offeror's customer relations efforts directed at customers that paid them for services and products and the customers who received the services and products. In the case of a Hotline or similar activity, the two customer groups would be (1) the government workers (i.e., Contract Officer, Project Officer and Work Assignment Managers) who managed the contract and (2) the people that made use of Hotline services.

Offerors with no past performance history, whose past performance history is not relevant, or for whom past performance data is not available, will not be evaluated favorably or unfavorably on past performance. Every attempt will be made to ascertain meaningful past performance information on which the offeror's prior performance can be evaluated. Note: If an offeror does not submit the past performance information required, and EPA becomes aware that the offeror, in fact, has relevant past performance history, the offeror may be deemed ineligible for award.

#### 4. Corporate Experience

(10 Points)

This evaluation criteria is distinct from the Past Performance criteria in that it pertains to the type and amount of work previously performed by the offeror rather than the quality of the work performed.

##### a. Corporate Management Experience

The Government will evaluate the offeror's corporate management experience to ensure that it can demonstrate, from its involvement with previously performed Hotline and/or clearinghouse operations, its ability to successfully undertake the activities stipulated in the contract and the SOW. The evaluation shall take into consideration the size, scope, and type of previously performed operations similar to those described in the Statement of Work, i.e.: responding to regulatory questions which require investigative research as responding to routine inquiries. If the offeror's corporate management is separate from the proposed management of this project, the offeror shall explain and be evaluated on how its corporate management will provide support for all areas of the operation of this contract. This is to ensure that all levels of the offeror's management will provide the necessary support to the performance of this contract.

##### b. Corporate Technical Experience

The Government will evaluate the offeror's demonstrative experience in fulfilling the technical requirements on contracts of similar size, and scope to the solicitation, including experience or familiarity with the regulatory programs, Federal Register notices and guidance and outreach documents identified in the SOW. The Government will evaluate the offeror's experience using the technologies described in the SOW.

#### 5. Facilities and Equipment

(5 Points)

The Government will evaluate the degree to which the proposed equipment, technology and facilities are adequate and appropriate to meet all the performance requirements of the SOW. As discussed in the Technical Proposal Instructions, Government Furnished Property [see SOW Appendix H] may be used

as part of this list. The functions of the equipment will be stated.

6. Personnel Qualifications

(15 Points)

The Government will evaluate key personnel based on their demonstrated experience, qualifications, availability, accomplishments, and relevant knowledge within their respective subject area(s). The Government will evaluate the individual resumes against the minimum qualifications specified in RFP Section H.18 and the specific factors described below.

Management Personnel - The Government will evaluate the qualifications demonstrated by the offeror in their proposal of the proposed project management personnel in the following areas:

- i. experience in managing contracts of a similar size and scope to that specified in this solicitation including their ability to manage an information service operation;
- ii. academic and other technical qualifications relative to this solicitation including familiarity with statutes and regulations identified in this solicitation;
- iii. ability to ensure proper operation of all equipment/technology (e.g., telephone system, Internet, computer modems, e-mail, computers and software needed for research, document production, etc.) identified in this solicitation; and
- iv. percentage of time that will be devoted to this contract.

Senior Technical Personnel - The Government will evaluate the qualifications demonstrated by the offeror in their proposal of the proposed senior technical personnel in the following areas:

- i. in-depth technical knowledge of the environmental statutes, regulations, guidance materials, policies, procedures, and programs set forth in the statement of work;
- ii. academic and technical qualifications which demonstrate the individuals ability to fulfill the requirements of the statement of work;
- iii. written and oral communication and customer service skills;
- iv. ability to perform research and familiarity with research resources;
- v. ability to develop and provide training in the technical areas covered by the SOW;
- vi. ability to operate the equipment and technology identified in the SOW; and the ability to teach their staff how to use it; and

vii. the percentage of time that will be devoted to the contract.

[NOTE: These requirements also apply to the proposed management personnel if the proposed management personnel will also perform technical functions.]

**II. FOR ORAL PRESENTATION**

**[ 30 POINTS ]**

Part A - Sample Information Requests

(15 Points)

Offerors will be evaluated on their demonstrated understanding of the Sample Information Requests and the clarity, appropriateness, adequacy, and creativity of their responses.

Key areas include:

- , identification of potential problems and/or opportunities associated with the request;
- , the manager(s) and staff assigned to handle the request and reasons for their assignment to the request;
- , and the different steps and timing involved in performing the request.

Part B - Pop-Quiz Questions

(15 Points)

Offerors will be evaluated based on their demonstrated understanding of the Pop-Quiz Questions and the thoroughness, accuracy, adequacy of their responses.

**III. SMALL DISADVANTAGED BUSINESS PARTICIPATION**

**[ 5 POINTS ]**

a. Offerors will be evaluated on this factor based on the extent of participation of Small Disadvantaged Business (SDB) concerns in the performance of the contract in the SIC Major Groups as determined by the Department of Commerce.

b. SDB participation will be evaluated based on the following criteria: extent to which SDB concerns are specifically identified; extent of commitment to use SDB concerns; and the complexity and variety of the work SDB concerns are to perform.